

# LAS/LAU SURVEY: PHILIPPINES

*Final Draft Questionnaire*

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## **KEY SPECIFICATIONS**

**AUDIENCE:** LEGAL-AGE SMOKERS & LEGAL-AGE SMOKE-FREE PRODUCT USERS

**GEOGRAPHY:** NATIONWIDE

**SAMPLE:** N=2,000

**GLOBAL AGENCY:** POVADDO

**LOCAL FIELDWORK PROVIDER:** ACORN

**TIMING:** August 3-15, 2021

## **OBJECTIVE**

QUANTIFY ATTITUDES AMONG LEGAL-AGE SMOKERS & LEGAL-AGE SMOKE-FREE PRODUCT CONSUMERS ON TOBACCO & NICOTINE REGULATORY ISSUES

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S1. What is your age?

35% 18-29

39% 30-44

26% 45+

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S2. What is your gender?

69% Male

31% Female

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Are you – or is any member of your immediate family – currently employed with/as:

**(RANDOMIZE) [IF "YES" TO ANY S3-S5: TERMINATE INTERVIEW]**

	<b>Yes</b>	<b>No</b>
S3. A newspaper, radio, or television station	0%	100%
S4. A market research or opinion research firm	0%	100%
S5. An elected official or in a policy making role in government	0%	100%

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Please indicate whether you are a regular user, occasional user, former user, or have never used each of the following. **(RANDOMIZE)**

	<b>Regular User</b>	<b>Occasional User</b>	<b>Former User</b>	<b>Have Never Used</b>	<b>Total User</b>	<b>Total Non-User</b>
S6. Cigarettes	49%	41%	4%	6%	<b>90%</b>	<b>10%</b>
S7. E-cigarettes	2%	3%	37%	58%	<b>5%</b>	<b>95%</b>
S8. Heated Tobacco Products	1%	1%	11%	87%	<b>2%</b>	<b>98%</b>
S9. Cigars/Cigarillos	11%	22%	12%	55%	<b>33%</b>	<b>67%</b>
S10. Tobacco pipes	2%	5%	10%	83%	<b>7%</b>	<b>93%</b>
S11. Shisha	*	10%	10%	80%	<b>10%</b>	<b>90%</b>
S12. Smokeless tobacco products like snus or nicotine pouch (containing no tobacco)	1%	1%	12%	86%	<b>2%</b>	<b>98%</b>
S13. Nga-nga	2%	3%	3%	92%	<b>5%</b>	<b>95%</b>

**[SURVEY TO CONTINUE ONLY IF RESPONDENT IS REGULAR OR OCCASIONAL USER OF ANY TOBACCO/NICOTINE PRODUCT (S6-S13)]**

**[ASK IF REGULAR OR OCCASIONAL USER OF SMOKE-FREE PRODUCTS (S7, S8, S12, S13)]**

S14. When using smoke-free products like e-cigarettes or heated tobacco products, do you typically use products that have...

- 53% A plain menthol flavor
- 19% A plain tobacco flavor
- 28% A flavor other than plain tobacco or menthol

Q1. Have you ever heard of, or are you aware of, something called an e-cigarette, also referred to as an electronic cigarette or vape?

- 97% Yes
- 2% No
- 1% Don't know

Q2. Have you ever heard of, or are you aware of, products that heat tobacco instead of burning it, also referred to as a heat-not-burn tobacco product or heated tobacco product?

- 43% Yes
- 47% No
- 10% Don't know

Q3. Do you think that the Philippine government should come up with new ways to reduce the harm caused by smoking cigarettes?

<b>90%</b>	<b>TOTAL YES</b>
<b>6%</b>	<b>TOTAL NO</b>
63%	Yes – definitely
27%	Yes
5%	No
1%	No – definitely not
4%	Don't know

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Q4. Have you recently seen, read, or heard anything about changes to the way cigarettes and other nicotine containing products are regulated in the Philippines?

53%	Yes
41%	No
6%	Don't know

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As you may or may not know, the Congress is currently discussing a bill to regulate smoke-free alternatives to cigarettes, such as e-cigarettes and heated tobacco products. This is due to the fact that most current laws about tobacco products were written with only cigarettes in mind.

As background, cigarettes and certain other types of tobacco products (such as cigars and tobacco pipes) create smoke by lighting and burning tobacco. Experts agree that burning tobacco and inhaling tobacco smoke is the main cause of smoking-related diseases like lung cancer, heart disease, and emphysema – not the nicotine.

Products like e-cigarettes and heated tobacco products do not burn tobacco. They use heat to create a vapor that provides nicotine and flavor. Because there is no burning, the vapor contains fewer harmful chemicals. Many experts believe these “smoke-free” products are a better alternative to cigarettes for people who would otherwise continue to smoke.

*Do you believe this or not? Specifically...*

Q5. Do you believe that products like e-cigarettes and heated tobacco products are a better alternative to cigarettes?

<b>72%</b>	<b>TOTAL YES</b>
<b>21%</b>	<b>TOTAL NO</b>
27%	Yes – definitely
44%	Yes
14%	No
7%	No – definitely not
7%	Don't know

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Q6. Do you believe alternative products like e-cigarettes and heated tobacco products should be just as accessible to adult smokers as regular cigarettes?

**83% TOTAL YES**  
**12% TOTAL NO**  
35% Yes – definitely  
48% Yes  
10% No  
2% No – definitely not  
5% Don't know

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Q7. Please indicate whether you agree or disagree with the following statement:

*The Government should enact policies that encourage adult smokers to switch to less harmful alternatives to cigarettes while also ensuring these products are not used by youth.*

**94% TOTAL AGREE**  
**5% TOTAL DISAGREE**  
66% Strongly agree  
28% Somewhat agree  
3% Somewhat disagree  
1% Strongly disagree  
1% Don't know

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Q8. Which of the following government strategies do you support the most to further reduce smoking rates in the Philippines?

**(RANDOMIZE)**

29% The government should provide more resources to assist smokers in quitting (e.g. programs, quit lines, etc.)  
26% The government should encourage smokers to switch to alternatives such as e-cigarettes and heated tobacco products.  
25% The government should encourage more contributions and innovation from manufacturers to develop alternatives which are better than continued smoking  
18% The government should further restrict how cigarettes can be marketed and sold  
1% Other (SPECIFY)  
2% Don't know

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You will now be shown some statements which have been made about the way alternative products like e-cigarettes and heated tobacco products could be regulated in the Philippines. For each, please indicate whether you agree or disagree. (RANDOMIZE)

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Total Agree	Total Disagree
Q9. It is important that alternative products like e-cigarettes and heated tobacco products are regulated fairly and not influenced by NGOs from foreign countries.	52%	37%	9%	1%	*	<b>90%</b>	<b>1%</b>
Q10. It is important that adult smokers have greater access to health-related information about alternative products like e-cigarettes and heated tobacco products which is backed up by scientific evidence.	61%	30%	7%	1%	*	<b>92%</b>	<b>1%</b>
Q11. E-cigarettes and heated tobacco products should have health warnings which accurately describe their risk.	70%	24%	5%	1%	1%	<b>94%</b>	<b>1%</b>
Q12. For adult consumers, free trials of e-cigarettes and heated tobacco products should be permitted so they can see if these products are right for them before purchasing them.	48%	34%	13%	3%	2%	<b>82%</b>	<b>5%</b>
Q13. Use of alternative products like e-cigarettes and heated tobacco products should be allowed in regulated vaping areas and open-air public places.	47%	32%	15%	4%	2%	<b>79%</b>	<b>7%</b>
Q14. It is important that rules and regulations on vaping areas are the same across the country.	60%	30%	8%	1%	1%	<b>90%</b>	<b>2%</b>
Q15. E-cigarettes and heated tobacco products should be allowed to be sold online as long as websites have age restrictions in place.	40%	31%	17%	8%	4%	<b>71%</b>	<b>12%</b>
Q16. Flavored smoke-free products should be allowed in the Philippines as long as they are not marketed or sold to non-smokers or youth.	54%	34%	9%	1%	1%	<b>88%</b>	<b>3%</b>

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Total Agree	Total Disagree
Q17. It is important that rules and regulations on alternative products like e-cigarettes and heated tobacco products are not more restrictive than those currently imposed on cigarettes.	38%	37%	17%	5%	2%	<b>76%</b>	<b>8%</b>
Q18. Instead of increasing the minimum age for e-cigarettes and heated tobacco products, the government should focus on better enforcement of the current law to prevent youth usage.	63%	27%	7%	2%	*	<b>91%</b>	<b>2%</b>
Q19. In order to ensure adult smokers have access to alternatives, e-cigarettes and heated tobacco products should be available at shops and kiosks and not only sold in pharmacies.	44%	38%	14%	3%	1%	<b>81%</b>	<b>5%</b>
Q20. Adult smokers should be able to find out about how e-cigarettes and heated tobacco products differ from cigarettes in shops and kiosks where they are sold.	57%	35%	6%	1%	*	<b>92%</b>	<b>2%</b>

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Q21. Please indicate whether you agree or disagree with the following statement:

*If alternative products like e-cigarettes and heated tobacco products are scientifically demonstrated to reduce the risk of smoking-related diseases, they should be taxed **less** as a way to encourage smokers to fully switch away from cigarettes.*

**86% TOTAL AGREE**  
**13% TOTAL DISAGREE**  
 47% Strongly agree  
 39% Somewhat agree  
 9% Somewhat disagree  
 3% Strongly disagree  
 1% Don't know

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[ASK ONLY TO COMBUSTIBLE TOBACCO USERS: REGULAR OR OCCASIONAL USERS OF CIGARETTES, CIGARS, CIGARILLOS, TOBACCO PIPES, OR SHISHA]

Q23. Would you consider switching to a smoke-free alternative product (such as an e-cigarette, heated tobacco product, or tobacco/nicotine pouch) if they were legal, met quality and safety standards, and were conveniently available?

<b>88%</b>	<b>TOTAL YES</b>
<b>8%</b>	<b>TOTAL NO</b>
50%	Yes – definitely
39%	Yes
6%	No
2%	No – definitely not
4%	Don't know

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[ASK IF Q23="YES" OR "YES – DEFINITELY"]

Q24. And, where would you like to find out more about smoke-free alternative products?  
*Please select all that apply.*

(RANDOMIZE)

72%	Health warnings on products which are different than those found on cigarette packs
66%	Product promotions in shops and kiosks
58%	Posters and product placement in shops and kiosks
52%	Age-restricted websites and mobile applications
52%	Print advertisements in publications with an adult-only readership
42%	Billboards
40%	E-mail, SMS, and other communications from product manufacturers
40%	Private events sponsored by product manufacturers
2%	Other (SPECIFY)
1%	Unsure

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**[ASK IF REGULAR OR OCCASIONAL USER OF SMOKE-FREE PRODUCTS (S7, S8, S12, S13)]**

For each of the following, please indicate how important they were in influencing your decision to try smoke-free alternatives such as e-cigarettes or heated tobacco products. **(RANDOMIZE)**

	<b>Very important</b>	<b>Somewhat important</b>	<b>Not very important</b>	<b>Not important at all</b>	<b>Don't know</b>	<b>Total Important</b>	<b>Total Not Important</b>
Q25. Recommendations from friends and family who had already switched	53%	37%	9%	2%	*	<b>89%</b>	<b>10%</b>
Q26. The ability to learn more about these products directly from manufacturers (e.g. websites, company representatives, etc.)	66%	29%	5%	*	*	<b>95%</b>	<b>5%</b>
Q27. The ability to use flavored products (e.g. menthol and other flavors)	54%	41%	4%	1%	*	<b>95%</b>	<b>5%</b>
Q28. The price of these products compared to cigarettes	66%	30%	2%	1%	*	<b>96%</b>	<b>3%</b>
Q29. The ability to learn more about these products at points of sale	63%	32%	3%	1%	*	<b>96%</b>	<b>4%</b>

**[ASK IF REGULAR OR OCCASIONAL USER OF SMOKE-FREE PRODUCTS (S7, S8, S12, S13)]**

Q30a. If the price of smoke-free alternatives like e-cigarettes or heated tobacco products increased significantly because of an increase in the excise tax, which of the following would you be **most likely** to do... **(RANDOMIZE)**

- 53% Reduce my usage of these products
- 15% Switch from these products to cigarettes
- 15% Purchase these products online or from other countries
- 13% Stop using these products altogether
- \* Other (SPECIFY)
- 3% Don't know



[ASK IF **FORMER OR NEVER USER** OF SMOKE-FREE PRODUCTS (S7, S8, S12, S13)]

Q30b. Please indicate whether you agree or disagree with the following statement:

*I would be less likely to try smoke-free alternatives like e-cigarettes and heated tobacco products if tax increases cause them to become more expensive.*

<b>83%</b>	<b>TOTAL AGREE</b>
<b>15%</b>	<b>TOTAL DISAGREE</b>
44%	Strongly agree
39%	Somewhat agree
13%	Somewhat disagree
2%	Strongly disagree
2%	Unsure

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[ASK IF S14 = "A FLAVOR OTHER THAN PLAIN TOBACCO OR MENTHOL"]

*You previously indicated that you typically use a flavor other than plain tobacco or menthol when using smoke-free alternatives like e-cigarettes or heated tobacco products...*

Q30. If smoke-free alternatives like e-cigarettes or heated tobacco products were limited to just plain tobacco or plain menthol flavor, which of the following would you be most likely to do...

(RANDOMIZE)

31%	Switch to plain tobacco or plain menthol flavor smoke-free alternative products
27%	Reduce my usage of smoke-free alternative products
18%	Purchase flavored smoke-free alternative products online or from other countries
14%	Stop using smoke-free alternative products altogether
9%	Switch from smoke-free alternative products to cigarettes
*	Other (SPECIFY)
1%	Don't know

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*Now, just a few final questions for statistical purposes...*

D1. In which region do you live?

43%	Metro Manila
14%	Central Luzon + North Luzon
21%	South Luzon
12%	Visayas
10%	Mindanao

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D2. Are you currently registered to vote?

95% Yes  
5% No

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D4. I know it is still a long way off, but how likely are you to vote in the upcoming General Election on May 9, 2022?

**97% TOTAL LIKELY**  
**2% TOTAL UNLIKELY**  
82% Very likely  
15% Somewhat likely  
1% Somewhat unlikely  
1% Very unlikely  
1% Don't know

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D5. And, if the presidential election were being held today, for whom would you vote?

**(RANDOMIZE)**

20% Sara Duterte  
20% Ferdinand "Bongbong" Marcos Jr.  
18% Isko Moreno  
9% Maria Leonor Robredo  
5% Ping Lacson  
4% Manny Pacquiao  
2% Grace Poe  
1% Vincente "Tito" Sotto III  
1% Bong Go  
1% Richard "Dick" Gordon  
\* Cynthia Villar  
\* Other  
1% I would not vote  
16% Unsure / undecided

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## EDUCATION

What is the highest level of education you have completed?

\* No formal education  
\* Some elementary  
\* Elementary  
\* Some high school  
7% High school  
20% Some college  
58% College  
2% Some graduate/advance  
10% Graduate/advance  
2% Vocation/technical training

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## INCOME

Which of the following best describes your monthly household income?

9%	Below PHP 10,000
13%	PHP 10,000 – 19,999
18%	PHP 20,000 - 29,999
15%	PHP 30,000 - 39,999
20%	PHP 40,000 - 49,999
10%	PHP 50,000 - 59,999
3%	PHP 60,000 - 69,999
1%	PHP 70,000 - 79,999
2%	PHP 80,000 - 89,999
3%	PHP 90,000 - 99,999
5%	PHP 100,000 AND ABOVE

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## OCCUPATION

Which of the following best describes your current occupation?

5%	STUDENT
5%	HOUSEWIFE/HOMEMAKER
3%	RETIRED
7%	UNEMPLOYED
2%	SCHOOL TEACHER/LECTURER/PROFESSOR
3%	SKILLED TECHNICIAN/PROGRAMMER
10%	SKILLED MANUAL WORKER
3%	UNSKILLED MANUAL WORKER
15%	EMPLOYED - CLERICAL
19%	EMPLOYED -OFFICER/SUPERVISORY/MANAGEMENT LEVEL
6%	PROFESSIONAL
17%	SELF-EMPLOYED [NO EMPLOYEES]
4%	SELF-EMPLOYED [1 TO 10 EMPLOYEES]
1%	SELF-EMPLOYED [11 TO 199 EMPLOYEES]
1%	SELF-EMPLOYED [200 EMPLOYEES AND ABOVE]

***THANK AND CLOSE INTERVIEW***

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